PERFORMANCE MANAGEMENT SYSTEM

Pragy AI-Enabled Operations Review System

Illustrative Monthly Operations Review Pack

Asteron Manufacturing

Fictional illustrative organization

TRUSTED KPIs

EXCEPTIONS

DECISIONS

ACTIONS

OWNERS

HUMAN-APPROVED AI DRAFT

Creating Value, Delivering Excellence

REVIEW CHARTER

Purpose, scope, and decision rights

One monthly operating review for the fictional Asteron manufacturing area

Purpose
Review performance, resolve material exceptions, make accountable operating decisions, and confirm action follow-through.

Scope
One manufacturing area, one monthly review, eight synthetic measures, one scorecard, one action register, and one decision log.

Sponsor
Vice President, Operations (fictional role).

System owner
Operations Excellence Manager (fictional role).

Participants
Operations, Quality, Supply Chain, Maintenance, Finance Operations, and Data Steward roles.

Cadence
Monthly, 60 minutes, with preparation completed two business days before the review.

Decision rights
Metric owners explain context; accountable leaders approve decisions, escalations, narratives, and action closure.

Exclusions
No autonomous decisions, compliance certification, validated-system claim, financial-benefit claim, or production deployment.

EXECUTIVE SCORECARD

Performance, exceptions, and action status

All values are synthetic and do not represent a benchmark or client result.

SAFETY ACTIONS	96%	Target 95% | Green
FIRST-PASS QUALITY	92%	Target 94% | Amber
ON-TIME DELIVERY	88%	Target 95% | Red
PLAN ATTAINMENT	93%	Target 92% | Green
DOWNTIME	6.2%	Target <=5% | Amber
BACKLOG AGING	14	Target <=10 | Red
ACTION CLOSURE	82%	Target 90% | Amber
DATA QUALITY	98%	Target 97% | Green

Review status

3 decisions required | 11 open actions | 2 overdue actions | 1 critical risk

Narrative: Reviewed - approval pending

KPI DEFINITIONS

Approved meaning before visualization

Two synthetic dictionary extracts are shown; the full fictional pack uses eight measures.

On-time delivery

BUSINESS QUESTION

Are completed orders meeting the confirmed customer date?

FORMULA

Completed on or before confirmed date / completed orders

OWNER / STEWARD

Supply Chain Lead / Reporting Analyst

SOURCE / REFRESH

Approved order register / daily

TARGET / THRESHOLDS

95%; amber 90-94.9%; red below 90%

REQUIRED RESPONSE

Review late-order exceptions, cause, owner, recovery decision, and closure evidence.

LIMITATIONS

Excludes cancelled orders and dates not approved in the fictional rules.

First-pass quality

BUSINESS QUESTION

What share of completed units passed the approved inspection without rework?

FORMULA

Units accepted first pass / inspected units

OWNER / STEWARD

Quality Lead / Quality Data Steward

SOURCE / REFRESH

Approved inspection register / weekly

TARGET / THRESHOLDS

94%; amber 91-93.9%; red below 91%

REQUIRED RESPONSE

Review material defect exceptions and approve the investigation or containment route.

LIMITATIONS

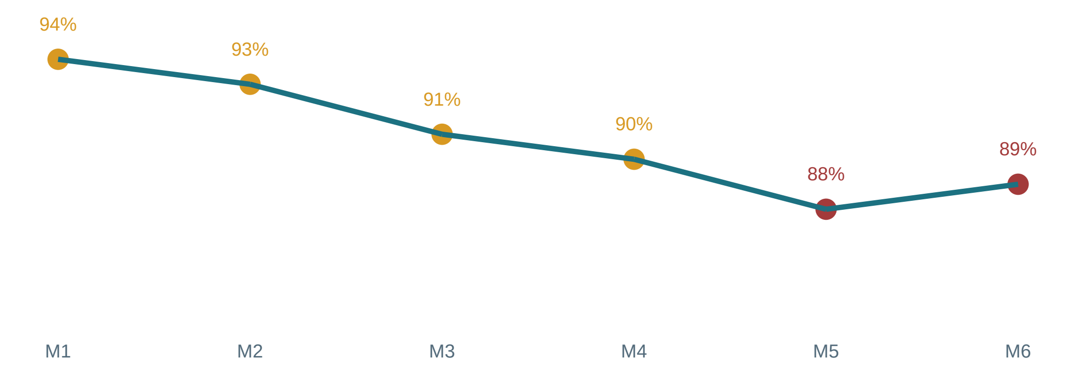
Synthetic example excludes inspection records pending final disposition.

TREND AND EXCEPTION VIEW

Use patterns and thresholds to focus review

Synthetic monthly values are illustrative only.

On-time delivery trend



Exception trigger: On-time delivery below 90% creates a red exception. The owner checks refresh and completeness, confirms context, records the cause hypothesis, and brings a recovery decision to the review.

- Data quality verified before interpretation.
- Not every variation is escalated; the approved threshold and materiality rules apply.
- The accountable owner determines meaning and response.
- Closure requires evidence and returns learning to the next review.

EXCEPTION SUMMARY

Context, owner, decision, and escalation

Synthetic exception records demonstrate operating structure, not actual results.

Exception	Status	Owner	Context	Decision required
Delivery below threshold	Red	Supply Lead	Three late orders; dates verified	Approve recovery priority
Quality trend	Amber	Quality Lead	Repeat defect family under review	Confirm investigation route
Downtime	Amber	Maintenance	Repeat equipment stop	Assign reliability review
Backlog aging	Red	Operations	Four items above sample limit	Approve capacity response

Review preparation: Every exception is reconciled to an approved metric, assigned to an accountable owner, and linked to a decision, action, escalation, or monitored status. A narrative cannot change the approved KPI value.

ACTION REGISTER

Ownership, due dates, blockers, and closure evidence

All actions and dates are fictional.

Action	Owner	Due	Status	Blocker / evidence
Confirm late-order recovery sequence	Supply Lead	15 Apr	In progress	Decision pending
Complete repeat-defect containment review	Quality Lead	18 Apr	Open	Inspection evidence
Review equipment repeat-failure route	Maintenance	22 Apr	Open	Work-order history
Close two overdue improvement actions	Operations	12 Apr	Escalated	Closure evidence missing
Verify next refresh reconciliation	Data Steward	25 Apr	Planned	Reconciliation checklist

Closure control: An action is not closed because a row was updated. The owner supplies the approved evidence, the accountable reviewer confirms the closure criteria, and unresolved risk is retained or escalated.

DECISIONS AND RISKS

Record accountable choices and escalation

Decision log

Recovery priority
Approve temporary priority sequence for three late orders.
Owner: VP Operations
Status: Approved with weekly check

Quality route
Confirm formal investigation for the repeat defect family.
Owner: Quality Director
Status: Decision required

Capacity response
Choose overtime, schedule change, or accepted backlog risk.
Owner: Operations Director
Status: Escalated

Risk and escalation log

Data latency
Refresh may arrive after preparation cut-off.
Owner: Data Steward
Status: Use approved prior refresh and label limitation.

Action ownership
Two actions lack closure evidence.
Owner: Operations
Status: Escalate at review.

Narrative status
AI draft may include unsupported context.
Owner: Human Approver
Status: Reconcile and edit before distribution.

AI-assisted draft - human verification required

AI is optional and excluded when governance, security, privacy, validation, or operating requirements are not met.

1. **Approved sources**
   Use only the approved scorecard, exception notes, and action register.

2. **Controlled logic**
   Use the approved prompt and version record.

3. **Draft generated**
   Label the output as a draft; do not distribute.

4. **Metric reconciliation**
   Verify every number, period, status, and source.

5. **Claim and context check**
   Remove unsupported explanations, sensitive data, or false certainty.

6. **Human edits**
   The accountable reviewer corrects and completes the narrative.

7. **Approval**
   Record approver, timestamp, and version before distribution.

8. **Fallback and feedback**
   Use the manual process when unavailable or unreliable; log errors and changes.

The review system remains usable, auditable, and accountable without AI. Accountable leaders approve the final narrative and every management decision.

A 60-minute meeting designed around decisions

0-5 min	Purpose, changes, and decisions required
5-15 min	Data quality and major context
15-30 min	Critical exceptions and trends
30-45 min	Decisions, risks, and escalations
45-55 min	Actions, owners, and due dates
55-60 min	Confirm commitments and next review

Preparation is completed two business days before review. Metric owners confirm context; the data steward confirms refresh and limitations; the sponsor identifies decisions required; action owners update status and evidence.

SYSTEM HEALTH

Monitor the review system, not only the KPIs

Synthetic health checks demonstrate a stabilization routine.

KPI definition approval

8 / 8 approved

Refresh completion

On time

Reconciliation

Passed with one noted limitation

Review attendance

All accountable roles present

Decision capture

3 decisions recorded

Action ownership

11 / 11 assigned

Overdue actions

2 require escalation

Narrative control

Reviewed; approval pending

Manual fallback

Available and tested

Improvement backlog

4 controlled items

NEXT STEPS

Scale, stabilize, revise, or stop based on evidence

STABILIZE

Resolve overdue actions, confirm narrative approval, and close the noted reconciliation limitation.

IMPROVE

Prioritize controlled backlog items based on decision value, risk, effort, and owner capacity.

SCALE

Add a site, data source, KPI, or review cadence only through approved scope and change control.

REVISE

Repair definitions, thresholds, data logic, agenda, roles, or training when evidence shows a weakness.

STOP

Retire a measure, AI feature, or system component when it does not provide controlled operating value.